



# **China Electric Bicycle Industry Report, 2012-2015**

**Nov. 2012**

## STUDY GOAL AND OBJECTIVES

This report provides the industry executives with strategically significant competitor information, analysis, insight and projection on the competitive pattern and key companies in the industry, crucial to the development and implementation of effective business, marketing and R&D programs.

## REPORT OBJECTIVES

- ◆ To establish a comprehensive, factual, annually updated and cost-effective information base on market size, competition patterns, market segments, goals and strategies of the leading players in the market, reviews and forecasts.
- ◆ To assist potential market entrants in evaluating prospective acquisition and joint venture candidates.
- ◆ To complement the organizations' internal competitor information gathering efforts with strategic analysis, data interpretation and insight.
- ◆ To suggest for concerned investors in line with the current development of this industry as well as the development tendency.
- ◆ To help company to succeed in a competitive market, and

## METHODOLOGY

Both primary and secondary research methodologies were used in preparing this study. Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional literature, annual reports, security analyst reports, and other publications.

Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

## INFORMATION SOURCES

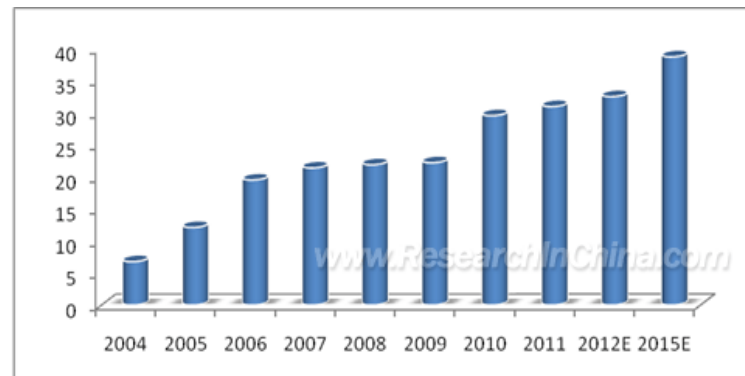
The primary information sources include Chinese Cycling Association, China Customs, and National Bureau of Statistics of China etc.

## Abstract

Chinese electric bicycle manufacturers went through a painful ordeal in 2011. The circular for rectifying the electric bicycle industry issued by the Ministry of Public Security, the Ministry of Industry and Information Technology, the State Administration for Industry and Commerce, and General Administration of Quality Supervision, Inspection and Quarantine, the rising price of raw materials like lead-acid batteries and the slowly growing demand because of market saturation depressed the electric bicycle industry into low-speed development from a boom in 2010.

The output of electric bicycles increased by only 4.8% YoY to 30.96 million units in 2011, with the growth rate slipping by 28 percentage points over 2010. The slow growth looks to continue into 2012. Amid the overall industry downturn, the strong get stronger and the weak fade away, with the acceleration of industry consolidation. The leaders like Yadea, AIMA and Xinri have started to further expand the market share by virtue of their edges in capital, technology, production scale and brand influence, while a large number of small-sized firms see the squeezed market space and plummeting market share and may face merger or bankruptcy. As a whole, the industry also embraces golden opportunity for development, though the majority of enterprises

### Electric Bicycle Output in China, 2004-2015E (Unit: mln units)



Source: China Bicycle Association; ResearchInChina China Electric Bicycle Industry Report, 2012-2015

encounter a crisis. Firstly, the quality of such components as battery and motor needs to be improved, and the energy-saving and environment-friendly features of Chinese electric bicycle products wait to be enhanced. Once these problems are addressed, the enterprises will rid themselves of the intense homogeneous competition, enhance their product profitability and effectively explore the international market; secondly, the uncertainty of domestic industrial policy and the imperfect management system hamper the industry development. As the State improves the management mechanism of electric bicycle and issues new standards for product quality, the Chinese electric bicycle industry will enjoy huge development space.

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Along with the increasingly fierce competition, some manufacturers like Xinri and Aima began to tap into central market instead of focusing on the Yangtze River Delta and Bohai Economic Rim to seize the initiative. They tend to establish production bases closer to the consumer market, and Shangqiu, Henan and Xiangyang, Hubei are expected to become new manufacturing bases of electric bicycle.

The report not only introduces electric bicycle industry in China, Europe, the United States and Japan, but also highlights the electric bicycle business of 28 domestic manufacturers including Jiangsu Yadea, Jiangsu Xinri, AIMA Hi-tech, Shanghai Lima and Shandong Bidewen, etc.

Jiangsu Yadea, a famous electric bicycle producer in China, tops the ranking of China National Light Industry Council (CNLIC) electric bicycle industry for consecutive three years. Headquartered in Wuxi, Jiangsu, the company now owns four production bases in Wuxi, Cixi, Tianjin and Dongguan, and boasts annual capacity of nearly 6 million electric bicycles.

Jiangsu Xinri is one of the leading electric bicycle producers and has rapidly expanded its capacity in the past two years. Its production base,

which is located in Xiangyang, Hubei and boasts annual capacity of 2 million electric bicycles, was officially put into operation in June 2011. Later in June 2012, its electric bicycle project with one-million capacity went into operation in Wuxi, when its total capacity amounted to 6 million electric bicycles per year.

AIMA Hi-tech is another leader in Chinese electric bicycle industry. It has built up new bases in Dongguan and Shangqiu in the recent two years, with both its capacity and sales volume rapidly expanding. In 2011, its electric bicycle led the industry in terms of sales volume which reached 2.6 million.

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